



ORTHO2

EMPOWERING PRACTICES

PRESIDENT'S PERSPECTIVE

Any typical year I would encourage you to attend the Ortho2 Users Group Meeting, and there are lots of reasons to do so.

The Classes: With more than 40 to choose from, you and your team can keep up on the latest and greatest Ortho2 software developments, as well as hear from a diverse group of industry consultants and doctors.

The Exhibit Hall: Each year we select companies to demonstrate unique and complimentary products and services to help with practice efficiency and individuality.

The Computer Room: Various members of the Ortho2 Team are assembled to help answer any question you may have.

BUT THIS YEAR IS DIFFERENT. After the year+ we've all lived through, connecting is more important than ever, and there are many ways to do so at this event.

Connecting With Your Team: The Ortho2 Users Group Meeting is a great way to team build. Dinners, Las Vegas shows, and the



legendary Ortho2 welcome reception are all great opportunities for your team to reconnect and relax after a challenging year.

Connecting With Other Ortho2 Doctors and Their Teams: The UGM isn't just about the classes. You can learn a lot by networking with other Ortho2 doctors and their teams. As regular UGM attendee Dr. Barry Feldman told us, "The interaction with other doctors at the meeting is invaluable. Hearing what other doctors are learning and doing with their offices, software, and staff keeps us all on the cutting edge."

Connecting With Industry-Leading Consultants and Doctors: Each year we select the best speakers in the industry so you can pick their brains. There are countless opportunities to benefit from these leaders in the orthodontic profession about topics that directly impact you and your team.

And last, but certainly not least, **Connecting with Ortho2:** You talk to us on the phone or via chat, you see our pictures in our holiday card, but do you really know us? If not, we'd like for that to change. This meeting is a fantastic opportunity to get to know your Ortho2 family. Members of Ortho2 Management, Network Engineering, Product Development, Quality Assurance, Sales and Marketing, and Software

President's Perspective *continued on page 14*

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SAVE THE DATE



38TH ANNUAL USERS GROUP MEETING

JANUARY 27-29, 2022
PLANET HOLLYWOOD RESORT & CASINO
LAS VEGAS

38TH ANNUAL UGM

We are excited to be hosting the 2022 Users Group Meeting in person! We hope to see you in Las Vegas for a time to connect, learn, and have fun. You can learn more about the Users Group Meeting at ugm.ortho2.com or contact Kim Barker, Meeting and Event Coordinator, with any questions at ugm@ortho2.com

WHAT PEOPLE ARE SAYING

"This was our first UGM to attend, and my team loved it! They said it was the best and most informative meeting they have ever attended. We just had a 'Lessons Learned from the UGM' meeting in our office, and the energy was amazing!"

- Dr. Ross Hunter, Hunter Family Orthodontics, The Woodlands, TX

"We implemented Ortho2 Edge Cloud one week prior to the UGM. This was a great opportunity to get ideas on how to design our charts, schedules, and office policies in conjunction with the new software. And we spent good quality time in the computer lab asking our questions."

- Dr. Erin Arnold, Arnold & DeSantis Orthodontics, Austin, TX



UGM BY THE NUMBERS

SINCE 1985 WE HAVE...

- | | |
|---|--|
| » visited 19 cities | » hosted more than 9,000 attendees |
| » traveled to Scottsdale, AZ, the most | » held more than 1,700 classes |
| » purchased nearly 700 opening reception costumes | » as an Ortho2 staff collectively won \$12,534 gambling in Las Vegas |
| | *lost \$14,215 gambling in Las Vegas |

INTRODUCING THE NEW SUPPORT.ORTHO2.COM

At the beginning of the year, we introduced the new Ortho2.com, and now we are excited to introduce the new Support.Ortho2.com. The Website Team has been working hard to redesign these pages to make the resources more accessible to you and your team.

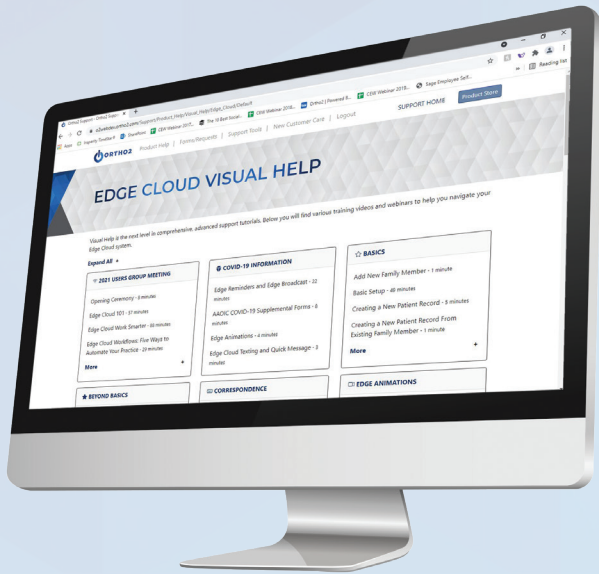
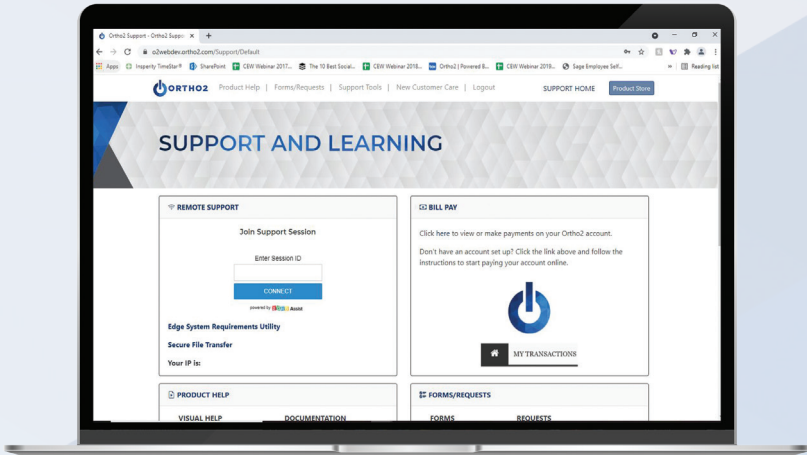
Updated Visual Help

The Edge Cloud Visual Help section not only got a cosmetic face-lift, but also an overhaul of new videos. The majority of videos were re-recorded to include new and updated information. If you are looking for information on a specific topic, we recommend using the Visual Help section.

If you are new to Edge Cloud, or have a new employee on your team, we recommend using the Training Program. These are longer videos that go in-depth on a topic to ensure new Edge Cloud users build a solid foundation of how to use the software.

Other Support.Ortho2.com Resources

- **Documentation:** Explore various topics in the Edge Cloud or ViewPoint documentation to learn more about how to use your software. In addition, you can find information on how to set up and use the integrations for each product.
- **Forms/Requests:** Here you can submit your enhancement requests through UserVoice, or submit a referral. You can also request a custom project (like setting up your Edge Reminders or requesting a custom report), or view various forms your office may need.
- **Support Tools:** Use these tools when directed to by the Software Support Team to see if your machine is compatible with Edge Cloud, securely transfer a file, or download a ViewPoint report.
- **New Customer Care:** Our new Edge Cloud and ViewPoint customers can use this area to review the information needed to begin using Ortho2 software. 📞



THE PIZZA PARTY

As we reach the middle of yet another interesting year, I want to turn our attention toward a critical facet of our businesses, our teams. As business owners, we can all appreciate the importance of these key players in our company's success, but when was the last time you evaluated their ability to achieve goals as a whole? I like to compare this to something we all did when we were kids in school, winning a pizza party.

I know you remember; your class would be tasked with a goal, collect this many box tops, score this high collectively on your exams, and if you do this, you will win a pizza party! Ah, the excitement, I can smell the pepperoni now! Let's face it, our teams are not much different now than they were then. Not to compare the quality of our teams to that of a third grade class, but rather, I want to draw the comparison that our teams can still be motivated in the same way a pizza party motivated the inner child in all of us.

While I think incentives are a vital part of any business, there is an inherent need for balance when we consider implementing these perks. I firmly believe that we should task our teams with the simple expectation that they do their jobs well without any additional incentives. After all, this is a professional work environment and not the end-of-year field day where everyone gets a participation award. So, when we begin figuring out how we can motivate our teams as a group, we must ask: what other incentives can I offer my hard-working counterparts that might motivate them in the same way a pizza party would motivate a third grade class? Let's talk it through.

Right now at the mid-year mark, is an opportune time to evaluate the progress you have made on any goals you may have set at the beginning of the year, as these goals should relate directly to the incentives you are offering to motivate your team. When doing a mid-year evaluation, actively consider if you are on track to reach your goals. If you are not, that's okay; there is still time to correct course. If you are, check in with your team to see if they are still excited about the incentives they will receive if they meet their goal. Don't be afraid to sit down with your team individually and ask them for their input or suggestions if they're on the

fence. Sitting down with them to talk about collective office goals can also lead to discussions about personal growth, job satisfaction, and general feedback. You might find that your incentives need a bit of editing or are a total hit.

Remember, when it comes to workplace incentives and job satisfaction, team incentives can increase productivity much more than individual incentives. Wondering why? Well, consider this: Teresa, the treatment coordinator, is provided bonuses for every start she gets. The rest of the team undoubtedly knows this but aren't offered any incentives for their part in getting that patient started. What do you think this does to your company culture? The new patient phone call, putting on the braces, and a great financial consultation are all things that aid in a new patient's overall experience in your office.

Think about how different your team would feel if you offered a quarterly production goal in which everyone receives an incentive when a start goal is met. Do you think that your team will work harder and feel happier in that situation? The answer is a resounding yes.

There's a reason why a pizza party was always a communal goal. No one wants to be left out of the party, just like no one wants to be the last person picked for the dodgeball team in gym class. So, when you are evaluating your incentives and gathering feedback in your mid-year review, think about whether or not your incentives are inclusive; are

Pizza Party continued on page 14

About the Author



Jill Allen is a national orthodontic consultant with a passion for helping doctors bring their practice dreams to fruition. Jill and her team specialize in start-up practices and doctors in business eight years or less; or eight years to retirement.

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COMMUNICATING WITH UNSCHEDULED ACTIVE PATIENTS

I have recently had several orthodontists reach out for my thoughts on a protocol for active patients with no scheduled appointment. I thought I would share my recommended protocol for these situations as well as the letters to use at 30, 60, and 90 days. Every one of the orthodontists I talked to mentioned the frustration of having active orthodontic patients, whose care they were responsible for, just slip through the cracks of any scheduling follow up system they had in place. They wanted to know how they could train their staff to keep this from happening.

What I have seen in my 30+ years of orthodontic consulting is that when an active patient does not have their next appointment scheduled (for whatever reason), there is usually a great initial staff effort to reach out to them but then there is no real protocol for multiple steady attempts to get them back into the system. Therefore, there is no record of any consistent office contacts. Before you know it, they are past due by months and have entered that slippery slope of unsupervised orthodontics.

Each orthodontist is responsible for the dental/orthodontic health of their patients, and having the patient seen on a regular schedule is critical. Any system to get an active patient rescheduled must be handled in a consistent, timely, and very well documented manner. The protocol I outline below meets all those criteria. Every text, email, or letter you send is saved in Edge Cloud's or ViewPoint's correspondence history so if you ever must prove that the office did their scheduling due diligence you would have an outstanding record of that.

I am a strong believer in educating your patients and parents as to what you need them to do during orthodontic treatment to make it a success for both the patient and the orthodontic team. I find that doing this prior to the start of treatment has the most impact on their cooperation during treatment. A New Patient Scheduling Contract is a great way to help your patients and parents excel in orthodontic scheduling throughout treatment. Click here to view a sample new patient schedule contract.

When a Patient Becomes Unscheduled

Day 1: At the time that a patient misses or cancels an appointment, or wants to leave without rescheduling, tell them you will be sending a text and an email asking that they reschedule within the next three days. The text and email would state that they have no scheduled appointment and please contact the office within the next three days so that an appointment can be put into the schedule promptly and treatment delay can be avoided.

Day 4: When a patient doesn't schedule their next appointment, create an Edge Cloud Task or ViewPoint To Do reminder for four days out. This reminds you to call if they have not rescheduled, and send another text and email if you are unable to reach them.

Day 21: When they are three weeks past due, make another phone call and send another text.

Day 30: At the 30 day point the patient/parent will have received at least two phone calls, emails, and texts. Send the following letter by both email and regular mail to guarantee it is received.

**Letter #1 30 Days Unscheduled Active
From the Scheduling Coordinator**

We know how busy life can get and we wanted to remind you that <nickname> was last seen for an orthodontic appointment on <last kept date> and presently has no appointment scheduled. We want to be sure that <nickname> finishes treatment as quickly as possible and that there is no damage to teeth or gums. At this point, <nickname> is over a month past due to be seen and we are concerned.

We have made several attempts by phone and text to reach you to schedule the next appointment, but have been unable to speak with you directly. Consistent orthodontic visits are an important part of orthodontic care and allow treatment to progress in a timely fashion. If there are unusual circumstances causing you to delay scheduling, please call the office so that we can help! We look forward to speaking to you soon.

31 to 60 Days: Continue consistent attempts to follow up by phone and text for the next 30 days with two attempts being made before the 60 day letter is sent.

60 Days: This letter would come from the orthodontist to help escalate the desire to get the patient rescheduled. In addition to being emailed, it would be sent by regular mail to both the responsible party and the general dentist.

**Letter #2 60 Days Unscheduled Active
From the Orthodontist, Cc: General Dentist**

My scheduling staff has notified me that <nickname> was last seen for an orthodontic appointment on <last kept date> and does not have another scheduled appointment. I am really concerned. I want to be sure that <nickname> finishes treatment as quickly as possible and that there is no damage to teeth or gums. At this point, <nickname> is over two months past due to be seen. My scheduling staff has made several attempts to reach you by text, email, letter, and phone throughout the last two months and have been unable to speak with you directly.

Unless you contact the office to discuss this situation or to schedule <nickname>'s next visit within the next 30 days, I will be forced to discontinue professional orthodontic care due to there being no appointments scheduled for orthodontic care in over three months. This is obviously the last thing that I want to occur. Please call us at (XXX) XXX-XXXX so that an appointment can be scheduled, and discontinuation of treatment will not be necessary.

If there are unusual circumstances causing you to delay scheduling, please call the office so that we can help. I look forward to hearing that the next appointment for <nickname> has been scheduled so we can get treatment progressing again.

Sincerely,
Orthodontist

Cc: General Dentist

“Every one of the orthodontists I talked to mentioned the frustration of having active orthodontic patients just slip through the cracks.”

61 to 90 Days: At this point, even the hardest hearted scheduling hold out will usually give the office a call and the appointment will be scheduled. Continue phone and texts several times throughout the next month.

90 Days: If you reach 90 days and they are still unscheduled, the following letter would be sent which would notify the patient/parent that they have terminated the orthodontic professional relationship due to having not scheduled the necessary appointments.

Please realize this would only be used in the cases where after the office has phoned, texted, emailed, and mailed and there has been no response at all from the patient/responsible party. This should be sent certified mail with signature requested.

Unscheduled Patients continued on page 15

About the Author



Natalie Beaton has more than 30 years of hands-on experience as a Treatment Coordinator and Financial Administrator. She works exclusively with Ortho2 clients to maximize their use of the Edge Cloud and ViewPoint systems in all critical practice areas.

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UNSTOPPABLE TEAMS – REBUILDING YOUR TEAM POST-PANDEMIC

It has been a challenging 18 months for all of us. We have faced unprecedented changes in both our work and home life placing economic, physical, mental, and emotional stress at an all-time high.

By now, you have gradually returned to work with new safety precautions, detailed protocols, and a new regiment for cleaning and sterilizing your office. As all these changes take place, you are also rebuilding your team with new team members to assist with the new protocols and some new team members to replace those who decided not to return after the pandemic.

This is the perfect time to schedule a 3–4-hour team meeting to reconnect while you revisit your practice foundation, core values, and mission statement. Here are some key questions to add to your agenda:

- What makes our practice unique?
- What attracts both existing and new patients/parents to our practice?
- What are we committed to?
- What specific actions show how we implement our mission statement daily?
- Review your accomplishments and accolades.

A word that was perhaps missing from our vocabulary and our lives last year is the word connect. We were told to stay at home, not gather with others, create a safe and isolated environment. With today’s new climate and culture, how can we return to work and make better connections with those key relationships?

Connect With Patients and Parents

- Reach out to all active patients to get them back on track with their treatment.

- Reach out to all pre-treatment and pending patients that were put on hold during the pandemic.
- Reach out to all new patients that are ready to get started. Perhaps you took advantage of doing “smile consults” online and want to continue offering this option.
- With parents no longer in reception rooms or chairside with their children, make sure we connect progress updates via texts, emails, or phone calls.
- Add information on your website about the new sterilization/safety protocols for the protection of

patients, parents, and your team.

- With your daily schedule perhaps being lighter to keep up with distancing guidelines, make sure we take advantage of this

opportunity and make more impact with the patients in the office.

Connect With Referral Sources

- Reach out to your referral sources to update them on your return and new hours of operation as well as your sterilization/safety protocols in place
- Find out if there is anything you can do to assist in your referral sources get back on track (telling all your patients to return for their dental visits, etc.).
- Continue showing your appreciation and gratitude for your referral sources by sending lunch to them, sending boxes of PPE supplies, invitations to online CE training programs, etc.
- Track and acknowledge your patient/parent referrals as well as Yelp/Google reviews.
- Consider giving out 5 or more \$1,000 gift certificates toward new treatment for your referral sources to share with families in need.

Connect With Your Community

- Continue to support your local schools/teachers, online auctions, any other community support as families still struggle (volunteer at a food bank, facilitate a food drive, reach out to those in need).
- Donate one complimentary case to a teacher who has gone above and beyond educating students during these trying times.
- Support a local summer camp assisting with registration for struggling families.

Connect With Your Team

We each bring unique qualities and skills to the team and collectively together create great results.

As you interact with your team and brainstorm answers and ideas, take the time to get to know your team members better. You spend more waking hours with your co-workers than your own family. Get to know them beyond their dental job description or role in the office. Appreciate and acknowledge their individual contributions to the practice. Respect and accept their differences. Ask some detailed questions to see how well you really know them:

- What challenges and lessons did they face during the pandemic?
- What challenges are they still dealing with?
- What creative ways did they utilize their time during the pandemic?
- What are their professional and personal goals?
- How long have they worked in the dental/orthodontic industry?
- How did they end up working in the orthodontic industry?
- If they were not doing what they are doing now, what other career/job path would they have chosen and why is that of interest to them?

- Invest in ways to stay connected during the year (celebrate work anniversaries, birthdays, Professional Administrative Day, Dental Assistant’s Week, etc.).
- Schedule quarterly fun team events (heritage potluck – sharing a food item and recipe that comes from your heritage – a team paint night, or other activity like bowling or miniature golf).
- Break up your team meeting with a fun activity (office scavenger hunt, team-building exercises, etc.).
- Make a list of wants and needs to finish out the year and what is needed as you prepare for 2022; pick three to five top things to focus on each year.
- Make sure your team morning huddle is filled with pertinent information as well as uplifting messages. NOTE: You can purchase a perpetual calendar full of motivational quotes from ADORE to kick off your 2022 year while supporting a great cause for the orthodontic industry (more details to come on this exciting project being offered by the ADORE committee of orthodontic consultants, speakers, and leaders in our field). ☺

“In the rush to return to normal, use this time to consider which parts of normal are worth rushing back to.”
–Dave Hollis

About the Author



Carol A. Eaton, Eaton Consulting, has been involved in the dental/orthodontic industry for more than 45 years sharing information in her consulting, seminars, and lectures. During the pandemic, she utilized her time facilitating team retreats, stayed connected with industry leaders online, and worked in support positions for clients returning back to work.

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INSIDE ORTHO2

Information about the people of Ortho2 and the resources available to you as a member

A FAREWELL TO FREE WEBINARS AND HELLO TO IMPROVED VISUAL HELP

For many years, Ortho2 has offered free webinars for you to attend on various Edge Cloud and ViewPoint topics. With the launch of the new Support.Ortho2.com, and the new cycle of Edge Cloud releases, it was a good time to transition away from scheduled and pre-recorded webinars. Instead, we are focusing our efforts on updating existing and creating new Visual Help videos as new features arrive in Edge Cloud.

As mentioned earlier in this newsletter, the Visual Help section of Support.Ortho2.com was updated recently, with many of the videos re-recorded to include new content. This quarter we'll highlight the financial videos, which are divided into five parts:

- **AutoReceipts:** Watch to see how to set up and post an AutoReceipt.
- **Contract Proposals:** Learn how to set up and use contract proposals.
- **Contracts:** Review how to create, write off, and reallocate various contracts, and more.
- **End of Day/Month Reports:** Explore the reports you should run at the end of the day and month.
- **Payments, Charges, and Adjustments:** Review how to post and adjust payments and miscellaneous charges.

If you have a topic you'd like to see covered in a Visual Help video, email ortho2support@ortho2.com.

RON BENIFIEL

From a young age, Ron Benifel, Ortho2 Equipment Repair Technician, has been fascinated with computers; both in how they work and when they don't. He took that love of computers and has made a career for 20 years with Ortho2 by repairing and building computers for our customers. Growing up, Ron was a military brat while his dad served in the Air Force. He was inspired by his father to join the military. His passions of service and technology combined when computers were introduced in his job with the Air Force. "Computers first came into my job when I was assigned as the training manager for my unit. My job was to track some 240 people in my unit and schedule all training for them," Ron said.

After his years in the military, and repairing computers for another company, Ron decided to join Ortho2 so he didn't have to travel anymore. He says he has stayed at Ortho2, "Not only because of my work with computers that I enjoy, but also because of all my fellow Ortho2 employees, which to me are more like a family of friends. The atmosphere here at Ortho2 makes coming to work every day a pleasure."

While he still works with computers, his interest with the Air Force can still be seen through building models of military air crafts. "Having spent 20 of my 24 years in the Air Force being a jet fighter mechanic being around them, I developed an interest in them and I built models of my favorite ones that I worked on over my years in the military," he said. Ron also enjoys cooking, reading, listening to music, gardening, working on my car, and being with his furkids.

Please help us congratulating Ron on 20 years of service with Ortho2!



JOE LEVENHAGEN

Last quarter we were able to celebrate Joe Levenhagen's 20th anniversary with Ortho2. Joe is currently the Quality Assurance Manager, and has held many positions since he started in 2001 including Hardware Builder, Hardware Phone Technician, and Quality Assurance Specialist. When Joe started with Ortho2, most customers were using OneTouch, our DOS product, and ViewPoint had just been released. He notes that one of the largest changes he's seen throughout his tenure is that the amount of products, modules, and services has increased significantly.



While Joe's childhood dream of playing quarterback for the Minnesota Vikings didn't pan out, he said 20 years with Ortho2 has gone by fast. "I chose Ortho2 because I was interested in the technology we were using," he said. "I accepted an entry level position with our hardware department to gain the experience I was looking for at the time. After about two years I moved to the development side of things and have never looked back."

Joe and his wife, Jodi, have three children, and when he isn't working he spends time on various hobbies that all revolve around spending time outdoors with family, friends, or his dogs. One of the most interesting things Joe has experience is witnessing a St. Elmo's Fire (the rare weather phenomenon, not the 1985 coming of age film starring Emilio Estevez) while fishing on Lake Superior.

Congratulations on 20 years with Ortho2, Joe!

CATHIE RALEY

Imagine calling in to the Software Support Team and having to either email or fax a picture of the issue you had going on with your Ortho2 software. That was a reality when Cathie Raley started her Ortho2 career in 2001. After several years as a Software Support Representative and Trainer, Cathie became a New Customer Care Specialist focusing on working with new customers and getting Edge Cloud or ViewPoint set up for their specific needs. Cathie remembers when she started, she was only supposed to be supporting OneTouch (Ortho2's DOS product) and passing any calls about ViewPoint off to another support representative. "My first day was on a Friday and one of the first calls I got was ViewPoint. My new coworkers were wonderfully supportive (or maybe it was just pure peer pressure) and I took that first ViewPoint call, and from that point forward I supported both our software programs," she recalled.



Cathie has one son, Will, whom she calls her pride and joy. After a decorated four years in the Air Force, Will is studying Mechanical Engineering at the University of Utah. When Cathie isn't spending time with Will, you can find her remodeling her house. (She'll do anything but major electrical work and hanging doors.)

Thanks to Cathie's 20 years of service, Ortho2 has had nearly 20 years of chili cook-offs. Cathie remembered, "When I first started at Ortho2, the new staff from the past year were asked to plan and host the office holiday party. I decided to do a white elephant gift exchange and a chili cook-off, and it was a hit. The following year I asked the new staff if they wanted me to do it again for them. They jumped at the chance. Thus the annual Ortho2 chili and soup cook-off was born. This last December would have been the 20th year, but due to COVID-19 we were not able to have it. I hope that I will be able to bring it back in one form or another this year."

Thank you for 20 years of service, Cathie!



INSIDE ORTHO2

Information about the people of Ortho2 and the resources available to you as a member

MEET THE TEAM – SOFTWARE SUPPORT

Any time you have a question about Edge Cloud or ViewPoint, there are many specialists available to assist you. The Software Support Team takes your calls to answer your questions, assists in enhancing your software, and trains new offices. This quarter features Nicole Gibson and Kimberly Kearney.

What’s fun/what do you enjoy about your current job?

NG: The people I work with are SO helpful!

KK: I love to help people and solve problems!

What do you want our users to know about what you do?

NG: We enjoy helping our customers and do not like when they are on hold.

KK: We care, and I have been in your shoes. We want everything to be perfect, so your day is easier.

Anything else you would like to add?

NG: Recently, I was the TC in an orthodontic office where we used ViewPoint and then converted to Edge Cloud. I know the importance of getting your questions answered as you have patients waiting for you!

KK: I have been in the orthodontic industry for almost 30 years. I have done it all from front desk, assisting, IT person, software support, you name it I have done it (well, I was never the doctor). I enjoy working with everyone and hope I can always brighten your day.



Nicole Gibson

Vacation destination: Any place with sun and a beach

Three people I would like to have dinner with: My Grandparents and my Aunt

My role model: My Dad

I can’t go a day without: The sun

What are you listening to right

now? Country

Favorites

Team: Any soccer team my boys are playing on

Software Program: Google Chrome

Movie: *Forrest Gump*

Food: Pizza

Phone App: Instagram



Kimberly Kearney

Vacation destination: Anywhere warm with a beach

Three people I would like to have dinner with: My Mom, Dad, and my bestie Tabitha

My role model: My parents

I can’t go a day without: Popcorn- it is my favorite and sometimes it is

my dinner

What are you listening to right now? Pandora yoga music

Favorites

Team: Chicago Cubs

Software Program: I love playing around in Canva

Movie: *Bottle Shock*, *Sideways*, anything with wine in it

Book: *The China Study*

Phone App: Solitaire

CAREER MILESTONES AND DEVELOPMENT

Welcome **Kimberly Kearney** to the Software Support Team! Kimberly joined Ortho2 on March 29 as a Software Support Representative. She previously was a Clinical Coordinator/IT Manager with Lloyd Orthodontics. We are excited to have you on board!

The Software Support Team also added **Nicole Gibson** as a Software Support Representative on April 12. Nicole spent several years as a Treatment Coordinator with Lovell Orthodontics before joining Ortho2. Welcome to Ortho2, Nicole!

Congratulations to **Jorge Rios** for accepting the Data Conversion Specialist position on June 1. Jorge has been with Ortho2 for six years as a Network Engineer. We wish you good luck in your new position!

ORTHO2 ANNIVERSARIES

Congratulations to these Ortho2 staff members who celebrated anniversaries during the second quarter of 2021.

Thirty-One Years

Ken Hoffmeier
Craig Scholz

Seventeen Years

Micky Augustin

Five Years

Brooke Hawke

Twenty-Nine Years

Kim Barker

Fifteen Years

Lindsey Spieker

Four Years

Joe Skluzacek

Twenty-Six Years

Clarence Bryan

Ten Years

Sean Gildersleeve
Michelle Haupt
Jess Huennekens

Three Years

Izzy Austin
Sam Rubenstein

Twenty Years

Ron Benifiel
Cathie Raley

Nine Years

Elizabeth Nordeen

One Year

Larry St. John

Nineteen Years

Barb Williams

Seven Years

Gabrielle Schaaf
Michael Lasley

President’s Perspective continued from page 1

Support Teams gather together with one thing in mind – to put on a great event for you. So make sure to say hello and tell us why you love working in orthodontics.

Consistently following an Ortho2 Users Group Meeting, we hear how this meeting uncovered new valuable features, helped boost staff motivation, and connected offices to others facing similar challenges, and there’s no reason 2022 will be any different. So join us in Las Vegas January 27-

29 at the Planet Hollywood Resort and Casino. Make the investment in your practice and your team to connect. You and your team will be happy you did!

If you have any questions about the meeting, please contact Kim Barker, Meeting and Event Coordinator, at ugm@ortho2.com. ☺

Amy Schmidt
Amy Schmidt, Ortho2 President

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they motivating your team, or are they just causing division?

One other essential component to consider when evaluating your goals and incentives is their originality. Incentives like monetary bonuses or trips might work well for one office, while another office would prefer a team hike and catered picnic. We often follow the path that our predecessors have already laid out for us and fail to see how we can forge our own. We see their accomplishments and use them as a baseline to develop our own incentives, seeking the same achievements by tracing the proven outline of their success.

I want to encourage all you amazing orthodontists to draw up your own goals and avoid tracing what is already in front of you. In your elementary school art class, tracing a picture or coloring within the lines was often the easiest, most comfortable thing to do. But it’s the scrawling, scribbling, colorful splashes against the page that are the most memorable, most fun, and ultimately what pushes us forward in the never-ending evolution of our business.

We may understand that a particular method worked for so and so down the street; it’s proven, so it must work for

me, right? Wrong. Often when we trace what others have already done, we forget about one tiny but crucial thing, your practice is unique. I have been consulting for a long time, and while I can say many orthodontic practices have similarities, they are very rarely the same. Each office has a different patient demographic, a different treatment philosophy, or a different company culture. When we try to set goals and incentives for our practices based on what other orthodontists have done, we are often trying to make ourselves fit into a mold that doesn’t encompass the real shape of our success.

So, as you approach your mid-year reviews, I want to encourage all of you to be bold. Move into this new normal with confidence and embrace your originality. We’ve all been told to think outside the box, but I want us to color outside of the lines, try new things, and explore new ideas that no one has dared to explore before. Scribble that originality and uniqueness into every facet of your business and avoid the desire to trace what is already there. ☺

Unscheduled Patients continued from page 7

Letter #3 90 Days Unscheduled Active Discontinuation Of Treatment
From Orthodontist, Cc: General Dentist

<nickname> was last seen for an orthodontic appointment on <last kept date>. I asked to see him/her again in <Fill in the number of weeks requested> weeks. My scheduling staff have made several attempts to schedule the next appointment, but I have not seen <nickname> for orthodontic care in over three months. In addition to phone calls and texts, two different letters were both emailed and mailed, to which you did not respond. As was clearly outlined in the second letter, it was essential that an orthodontic appointment be scheduled within thirty days, which has not occurred.

This letter confirms your termination of our orthodontic relationship by virtue of your failure to have <nickname> appear for orthodontic appointments. As of today, <date>, you are withdrawing <nickname> from further professional orthodontic care with me. I will be available for the next 30 days for any orthodontic comfort or emergency care needs that <nickname> might have.

Since <nickname>’s dental condition requires further treatment, I urge you to immediately seek care and treatment of another orthodontist. If the braces are not removed or properly supervised, serious consequences could occur including, but not limited to decalcification of teeth (discoloration of tooth enamel), increased risk of cavities, and the possibility of damage to soft tissues in the mouth from loose or broken appliances.

Should you properly authorize the release of our records, we will be happy to forward them to the orthodontist of your selection.

I regret that you have chosen to withdraw <nickname> from my orthodontic care.

Sincerely,
Orthodontist

Cc: General Dentist

If they get in touch after this letter the orthodontist can make the decision case by case about whether you are willing to bring them back in after over 90 days of not being seen.

My goal with this protocol is not to have to discontinue treatment, it is always to get the active orthodontic patient back into the schedule as soon as possible. This protocol offers the consistency, timeliness, and documentation that your office needs to handle the unscheduled and unsupervised active patients. ☺



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